

UNIVERSITY OF ILLINOIS SYSTEM
 URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

**Instructions for Completing an
 Equipment Loan Agreement**

STEP 1: Complete the [Equipment Loan Agreement](#)

Fill in the three blank boxes in the first paragraph.

Blank 1 – the name of the loaning unit from the University of Illinois

Blank 2 – the name of the recipient institution

Blank 3 – the address of the recipient institution

Section 1: Equipment Description and Permitted Use

Check box 1.1 if the equipment was purchased directly with grants funds. Fill in the two blank boxes for the project title and Principal Investigator in charge of the project.

Check box 1.2 if the equipment was purchased with funds other than grants funds. Fill in the one blank box to describe the purpose of the loan.

If the equipment to be loaned is from both sponsored and non-sponsored funds, check both boxes.

Section 7: Term

Fill in the one blank box to indicate the end of the loan term.

Schedules of Equipment

Complete the Schedule of Equipment by listing in the tables the "Sponsored Equipment" or "Non-Sponsored Equipment" to be loaned.

- Sponsored Equipment is purchased directly on grant funds.
- Non-Sponsored Equipment is purchased on other fund types, including ICR (Indirect Cost Recovery).

The columns labeled "For Export-Controlled and/or International Loans" are only required for those types of loans.

The unit is responsible for obtaining the Unit Head signature on the Schedules of Equipment.

Form Field	Description and Instructions
Ptag	Inventory number of asset (nine digits). Use Serial # if not tagged or not in Banner. If neither exists, e.g., furniture, enter "N/A."
Title To	Can be found in Banner FFIMAST. S – State of Illinois/University of Illinois F – Federally Owned O – Other
Responsible Chart/Org	Chart and Organization Code under which the equipment is listed. These can be found in Banner FFIMAST. Chart: 1 – Urbana 2 – Chicago, DSCC, Rockford, Peoria 4 – Springfield 9 – System Offices

	Org Code: 6-Digit Organization Code
Description	Give a complete description of the equipment being transferred. Examples: "Zeiss Microscope," "Model 459x."
Serial #	Serial number of the equipment.
Date Acquired	Can be found in Banner FFIMAST.
Acquisition Cost	Original cost of the equipment. Can be found in Banner FFIMAST.
Funding Source FOP	Fund, Organization and Program codes of the funding source.
Grant Code	A five-position, alphanumeric code that is assigned to each sponsored project.
Manufacturer/Distributor	For export-controlled equipment or equipment to be transferred to another country, indicate the manufacturer/distributor. This information should be available from the original purchase documentation or from labels on the equipment itself. Do not send owners' manuals via email as they may be subject to export controls.
Model Number	This information should be available from the original purchase documentation or from labels on the equipment itself. Do not send owners' manuals via email as they may be subject to export controls.
ECCN or USML	Export Control Classification Number. The ECCN indicates the equipment is classified on the Commerce Control List (CCL) and is subject to the EAR. An export license <u>may be</u> required before these items can be transferred to an international destination or a non-U.S. person. U.S. Munitions List. Items categorized on the USML are considered defense articles or technical data and are subject to the ITAR. An export license <u>will be</u> required before these items can be transferred to an international destination or a non-U.S. person.

Obtain the recipient institution signature.

STEP 2: Complete the [Property Accounting Contract Approval Routing Form \(PA-CARF\)](#)

Units must complete sections 1 through 5.
 If sponsored equipment is being loaned, units must select the correct office from the drop-down in section 5 and then route the PA-CARF and Equipment Loan Agreement to that office.
 If no sponsored equipment is being loaned, the unit should route the forms to the appropriate export control office (if there is export controlled equipment) or to Property Accounting (if no export controlled equipment).
 Property Accounting will obtain final approval and signature on behalf of the Board of Trustees of the University of Illinois.

STEP 3: Loan the Equipment

Property Accounting will provide the unit a copy of the fully executed Agreement and PA-CARF along with further instructions regarding updates to the equipment records in Banner. The equipment may then be loaned.